Philanthropy can be a Solution to Making Localisation a Reality

Policy Paper

W I N G S
ELEVATING PHILANTHROPY

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1. Introduction

As a long-term trend, accelerated by the response to Covid-19, the development cooperation and humanitarian aid sector have realised the urgent need to imagine and realise a better, more equitable, localised investment and deployment of resources. This is driven in part by the pandemic, which highlighted and exacerbated existing issues of inequality, poverty, declining civic spaces and unemployment.

Localisation has been a word to describe that collective process through which a diverse range of stakeholders have a role to play, each in their own way, to ensure that the ownership of development efforts is held locally, with accountability to domestic constituents versus international donors for the planning, delivery and assessment of their communities' and country's development. Philanthropy as a stakeholder has a key role to play in making localisation a reality.

This policy briefing is offered as a think piece to prompt further, future reflection by international and domestic actors in development cooperation and humanitarian aid about how they each can act to reinforce local philanthropy to further genuine and sustainable localisation.

Outlined in this paper is a simple but powerful argument: Localisation is a trend that is important to achieve development impact for the realisation of the Sustainable Development Goals (SDGs). Philanthropy is in fact an agent of localisation, ready to play a central role in development dialogues. Unfortunately, there is not enough investment in domestic philanthropy, although it is an answer to some of the challenges in the implementation of localisation. Some 80% of funding for infrastructure is concentrated in North America (WINGS, January 2018), which means that infrastructure is under-funded where it is most needed. Therefore, a key way to make localisation a reality is to boost local philanthropy by supporting the development of the domestic philanthropy support ecosystem (PSE) and philanthropic support organisations (PSOs) that create that local giving ecosystem.

As a means to prompt further dialogue, this briefing concludes with recommendations to various kinds of development actors about how to support domestic philanthropy. By doing so, localised philanthropic giving can play a role in bridging the gap between an **intention** to channel assistance to local actors and the **actual delivery** of long-term, sustainable, locally-built and owned solutions.

2. Localisation falling short

The term 'localisation' was officially introduced into the humanitarian system agenda during the 2016 World Humanitarian Summit to describe putting local actors at the centre of the humanitarian agenda, shifting project ownership from international actors to local ones (World Humanitarian Summit, 2016).

Conceived to address different problems, humanitarian assistance and development cooperation efforts are often coordinated separately, traditionally draw resources from different funding streams, and have very different implementation timeframes (The Guardian, 2015). Regardless of sector, international NGOs are now searching for concrete actions to build equitable and locally-led partnerships with local/national actors, including increased access to international and national funding (Christian Aid, CARE, Tearfund, ActionAid, CAFOD, Oxfam, 2019).

Yet efforts to deliver more resources for local implementation of development and humanitarian aid have stalled. Six years after the international community committed in the Grand Bargain to provide 25% of humanitarian aid funding "as directly as possible" to local and national organisations, that figure remains far from being met. This is due in part to insufficient political commitment to overcome political barriers to change (ODI, 2021) and insufficient institutional incentives to localise, when international actors are hesitant to follow through on promised shifts in resources when it is seen as undermining their own funding and resource base (CAF, 2021).

And the percentage of official development assistance directly reaching civil society in the Global South only marginally increased from 2.8% in 2016 when that commitment was made (Development Initiatives, 2021). Local civil society has said that partnership with international NGOs has not been mutually beneficial because decisions on development are taken in a one-sided and top-down way (Rights Co Lab, 2021).

In the current context, the hardship and economic damage caused by the Covid-19 pandemic has undone development gains that many countries in the Global South made in recent decades (OECD, 2020), with the cost of public health making it near impossible to achieve the SDGs by 2030 (UNDP, 2020). While the EU provided EUR 25 billion in assistance in 2019, much more investment is needed to achieve the SDGs, according to Martin Seychell, Deputy Director-General for Human Development, Migration, Governance, Peace and Resources at the European Commission (WINGS Philanthropy in Focus blog, 2021).

At the same time, the coronavirus pandemic showcased the capabilities of local organisations that continued programming while field staff were withdrawn from the Global South to the relative safety of head offices in Europe and North America (New Humanitarian, 2021). Amid the challenges of the Covid-19 pandemic, a joint study by international NGOs (Humanitarian Advisory Group, 2021) showed that the expatriates' absence didn't stall work. Instead, the decision-making space for local civil society expanded for local stakeholders.

3. Defining actors in localisation

Unpacking the terminology

In talking about localising resources and aid implementation, clear definitions are important:

- Localisation – A process by which different stakeholders of the aid system (donors, United Nations agencies, international NGOs) return local actors (local authorities or civil society) to the centre of development cooperation and humanitarian assistance efforts with a greater and more central role (adapted from Trocaire, 2019).
- Local - 'Local' programmes are those owned and led by people working in the domestic context, including small-scale grassroots initiatives by communities, as well as national activities in a city.
- Local Civil Society Organisations (CSOs) - All non-market and non-state organisations at the country level outside of the family in which people organise themselves to pursue shared interests in the public domain. The term covers a wide range of CSOs that are membership-based, cause-based and service-oriented.
- Local (domestic) philanthropy - The practice of local giving of time, money, experience, skills and or talent, all with the altruistic objective of improving human welfare. This ranges from middle class giving to high-net-worth individuals, and from community philanthropy to corporate and institutional philanthropy. It also includes civic engagement beyond financial giving, such as volunteering, gifts in kind and skill sharing.
- #ShiftThePower – A hashtag started by the Global Fund for Community Foundations has become a movement addressing power imbalances between Northern and Southern entities, as well those large and small, rich and resource-scarce in networks.
- Philanthropy support organisations (PSOs) are intermediary infrastructure organisations that include entities that provide a variety of services to support and strengthen philanthropy, but usually do not directly implement programmes themselves.
- Philanthropy support ecosystem (PSE) – The dynamic community of interacting organisations, functions and activities that assists and enables the achievement of philanthropy's potential by nurturing its capacity, capabilities, connections, and credibility. It includes a multiplicity of actors, both domestic and international.

Further commitments in the development cooperation sector demonstrate a growing consensus that humanitarian action must be more localised to "build back better" following the pandemic. The international community has seen a new urgency to address the large discrepancies between global and local investment needed to build local and national leadership and strengthen civil society.

African NGOs, for example, receive only a modest share of resources being given for the region's development. Over a 10-year period, donors based in Sub-Saharan Africa directed just 9% of large gifts (by value), and non-African i.e. international funders just 14%, to NGOs based in Sub-Saharan Africa. Instead of the latter receiving funding directly, much of the resources flowed through intermediary international NGOs (Africa Philanthropy Forum, 2021).
Part of the problem may lie in defining the actors in localisation. An earlier UN definition of localisation called it "the process of taking sub-national contexts in the achievement of the 2030 Agenda", which omitted the importance of strengthening local civil society to better address local needs. In contrast, the OECD views localisation as "a process of recognising, respecting and strengthening the leadership by local authorities and the capacity of local civil society" in the localisation process and its desired outcomes (CAF and LSE, 2021).

Numerous international frameworks and initiatives underscore the centrality of national and local action by civil society, from the Paris Principles (1993) and Accra Agenda for Action (2008) to the Busan Partnership for Aid Effectiveness (2011), the SDGs/2030 Agenda (2015) and the Nairobi High-Level Meeting of the Global Partnership for Effective Development Co-operation (2016).

The SDGs have provided a framework for leveraging the comparative advantages and strengthening collaboration between national and international actors. This localisation matters because "…local organisations and local philanthropy bring on the ground knowledge and skills, access and presence, analysis, and help us understand the local context and connect resources to local communities", according to the EU's Martin Seychell. "Without addressing these local actors (civil society and philanthropy), ...there is a big risk that we do things that exist only on paper" (WINGS Philanthropy in Focus blog, 2021).

4. Philanthropy as an agent of localisation

Philanthropy can be a solution to help development cooperation agencies' partner countries diversify their global investments directly into local civil society for vital projects of health, education and empowerment.

- Growing local resourcing for local civil society provides advantages to development cooperation by assisting them to assume greater risks to invest, pilot, and scale up local solutions. Recent case studies illustrate how the philanthropy sector can help localise support for frontline civil society organisations by providing research, professional training, policy advocacy and governance support to develop capabilities (WINGS, May 2018).
- Growing and strengthening local giving can also be achieved by investing in the domestic philanthropy support ecosystem (PSE) to benefit the community of philanthropy at the local level. A crucial caveat, however, is that existing cultures of giving must be recognised and built upon, with local actors in the lead, so outside resource investment does not negatively disrupt existing local networks.

Domestic PSEs have long been underdeveloped although they tap into the long-term capability of national and local institutions and individuals to drive bottom-up solutions to complex development problems (WINGS PSE, September 2021). An additional US $651 billion in funding to realise the SDGs could potentially be unlocked from philanthropic sources by 2030, which is an additional US $286 billion in financing than initially thought (SDGPP, 2021).

Domestic philanthropy can be 'external' to civil society and fund it, but it can also be a multiplier when there is an investment in the PSE. A healthy domestic philanthropy can facilitate the growth of support for local NGOs and CSOs not just by growing local giving but also by providing platforms for collaboration across sectors -- both at national but also international levels (Charities Aid Foundation, 2020). In this way, such investment in local philanthropic infrastructure offers international donors safe and impactful ways to give to local organisations directly. With domestic philanthropy as a partner, and when helped to grow, the impact of international investments is multiplied.

5. Overcoming challenges to localisation

Localisation is the result of a wide range of changes; particularly those dimensions of development that are related to political contexts, partnerships, financial flows and accountability. In each of these four dimensions, supporting the development of local philanthropy can answer some of the challenges to the implementation of localisation.

In a **political dimension**, the pandemic has heightened the shrinking civil society space through restrictions on freedom of expression, assembly and association that have tightened in the name of sovereignty and self-determination of governments (Brot für die Welt, 2021). In particular, cross-border international funding of projects and organisations can be limited by government regulations, sometimes as an unintended consequence -- and sometimes not (FATF, 2021). A review by the global Civil Society Organisation Partnership for Development Effectiveness listed restrictive measures and regulations governing civil society around the world that can become arbitrarily or selectively applied.

These included mandatory registration that makes illegal the work of unregistered smaller community-based funding associations, as well as unclear or multiple laws and regulatory restrictions, creating complex and expensive procedures (CPDE, 2014). Political will at the domestic level can be mobilised by the philanthropic community to remove these barriers.

Localising development in a **partnership dimension** means allowing decision-making to move to the local and national levels. Unfortunately, localisation has sometimes been interpreted as supporting national decision-makers in an urban context. Community organisations, associations and foundations that are effective in mobilising resources and carrying out development activities are in the countryside -- outside of big cities. Therefore, development cooperation effectiveness must rely upon principles of equal partnership to create an enabling environment for local civil society, local philanthropy and local giving.

There is a further **financial dimension** to philanthropic localisation. Obstacles to devolving decision-making can arise when debilitating restrictions are placed on local and national philanthropic actors in accessing funding flows. Strengthening local fundraising means building a philanthropic support ecosystem. Despite demonstrated impact, however, there is a structural lack of investments in creating an enabling environment for local philanthropy.

While foundations' assets exceed US$ 1.5 trillion globally, they are heavily concentrated in the North – 60% in USA; 37% in Europe (Harvard, 2018). And U.S. foundation funding for the philanthropic support ecosystem outside the U.S. accounted for just 3.5% of total infrastructure funding and declined by 43% over 12 years from 2004 to 2015 (WINGS, October 2018). In Africa, which offers great potential for philanthropic growth through innovations such as online and social media giving, the philanthropy support ecosystem is not evenly developed in the continent and infrastructure is weak (Africa Philanthropy Network, 2010).

A final facet of localisation lies in the **accountability dimension**. The participation of affected people is at the heart of good accountability and inclusion. It can mean the difference in whether development cooperation engages marginalised groups and whether that engagement matches local community standards.

In addressing the "compliance conundrum", USAID Administrator Samantha Powers listed some of the challenges to implementing localisation: the greater amount of time involved in working with local organisations, especially with a small group of contracting officers; the regulatory burdens and paperwork that local organisations often lack the capacity to handle; and the risk of overwhelming a small organisation with too big an award (Devex, 2021). Calls for "decolonisation of development" therefore include a strong political push for strengthening the accountability of local leadership, including home-grown philanthropists.

6. Approaches to involving philanthropy in localisation

Supporting local philanthropy at this tipping point can catalyse change in localising assistance, rather than allowing international debate over localisation to become another technocratic exercise with more ineffective, top-down policymaking. Community foundations, for example, have continued to play a vital role during the pandemic—creating Covid19- funds, partnering, and coordinating with local governments and organisations, and providing much-needed support to non-profits on the frontlines of their communities (Candid, 2021). And the potential resources from mass giving by individuals, including through charitable crowdfunding, is growing in some regions at a greater rate than ever.

Changes in perspective and resource allocation by development cooperation (Charities Aid Foundation, 2021) can unleash potential resources locally. A few general principles on philanthropy include:

- Localisation should foster philanthropy diversity and guarantee that communities, minorities, and any underrepresented and vulnerable groups are heard. Traditional forms of giving should be recognised and built on to create organisations and a culture of giving that works to the strengths of the local context.
- Philanthropy should be seen as a strategy for driving development, rather than an additional consideration. Instead of undervaluing its contribution, donors should see a healthy philanthropic ecosystem as guaranteeing an enabling environment in which to raise and distribute local and foreign funds.
- The international community needs to support calls for an enabling environment for local civil society organisations and philanthropy, which should be regulated in a fair, consistent and open way, with independence to give and receive resources.

- Localisation is not an alternative or solution for the reduction of foreign aid. Conversely, development cooperation can have impact and leverage if invested in the creation of an enabling environment set in a broader ecosystem that helps local philanthropy to sustain local civil society's work that is not dependent on aid.
- Prioritise building resilience through enhancing a local philanthropic infrastructure with philanthropic support organisations (PSOs) that support both in-country fundraising and resource mobilisation from the diaspora, as a means to generate sustained domestic funds for civil society even after aid ends.

On the last point, it is important to note that the basic engines that help create and sustain such ecosystems are the PSOs. The impact of PSOs lies in growing the volumes of charitable giving, and their ability to increase the effectiveness in the use of philanthropic resources is well documented (WINGS 2020).

These organisations work to increase the local resource base through encouraging a culture of local giving and investment in 'home-grown' development initiatives and locally managed funding mechanisms. PSOs are also key in recognising and articulating the strengths of different stakeholders, boosting effectiveness since as a local actor they bring in a deep understanding of local political, cultural and governance aspects.

7. The role of WINGS

Local philanthropy, as a force to support civil society and development, has the potential to play a much more central role in dialogues about how best to implement localisation. In particular, there has been a gap in consideration about how to involve local philanthropy in resource development efforts sustainably.

To address this, on 23 September 2021 WINGS convened a group of senior representatives of governments, development cooperation agencies, international NGOs, and philanthropic communities to exchange views at a side-event to the UN General Assembly on 'Boosting local philanthropy to make aid localisation a reality' (WINGS Philanthropy in Focus blog, 2021).

That constructive discussion aimed to spark action-oriented dialogue on how to support and strengthen domestic philanthropy in building the successful localisation of development cooperation and humanitarian aid, and shared experiences about philanthropy's role in catalysing local communities' work. Opening the September event, Martin Seychell, European Commission Deputy Director-General, described philanthropy as a solution to help the EU's partner countries diversify their investments directly into each country's civil society for vital projects of health, education, and empowerment.

Michele Sumilas, Assistant to the Administrator at USAID, agreed that for too long, development agencies have ignored this type of localised giving and the philanthropic sector generally. “We look forward to finding new ways to work with them (philanthropy) – in parallel and together, maybe in joint funding – thinking about creating enabling environments where they can thrive”, Sumilas said.

In 2022, a series of workshops organised by WINGS will continue that discussion further, exploring common approaches that can be taken by civil society, foundations, development agencies, and donor governments to support domestic philanthropy and a vibrant ecosystem of giving that can deliver commitments in Agenda 2030 and what comes after.

WINGS, in collaboration with its +190 members in 59 countries of the world, is working to find ways to strengthen and develop local ecosystems as a critical action for sustainable and inclusive localisation. WINGS is partnering with philanthropy and international support on mapping the PSE Ecosystem in East and West Africa, building on previous work carried out in Latin America and India. WINGS is also dedicated to cross-regional collaboration and convening and building a philanthropic movement on cross-cutting critical issues such as climate change.

Local civil society and foundations, philanthropic intermediaries, giving advocates, and charity capacity builders in local philanthropic ecosystems all need support from the international community. It is important, however, that this help is seen as an additional source to international aid funding, not as a replacement.

The future of philanthropy, both local and international, lies in mobilising to build domestic philanthropy ecosystems that have long been underdeveloped and thus to tap into the long-term capability of local institutions and individuals for sustainable resources. Localisation combined with local giving promises to literally unlock both domestic and international investments, both public and private.

8. Recommendations

WINGS has an initial set of recommendations, to be refined in sectoral-specific discussions to be convened by WINGS about ways various actors can support local philanthropy:

8.1 International level (for bi-lateral development funders and global philanthropic actors)

8.1.1 Support initiatives to create a favourable international environment for philanthropy, including unhindered cross-border giving.

8.1.2 Promote learning and sharing of best practices across different countries and regions, for example, by better connecting organisations in their portfolio, or supporting platforms focused on knowledge sharing.

8.1.3 Fund existing philanthropic ecosystems or support the creation of new infrastructure to generate funds for civil society even after aid ends.

8.2 National level (for national partner governments, philanthropy and civil society)

8.2.1 Support campaigns and initiatives that promote a culture of giving, including recognising and building on traditional forms of giving that draw upon the strengths of the local context.

8.2.2 Support policies that address the enabling environment for philanthropy and civil society in general, and build the long-term capacity of support organisations.

8.2.3 Help to build data, information and intelligence on philanthropy and its contribution to development and civil society building.

8.2.4 Undertake a mapping of existing philanthropy support organisations, with the aim of strengthening their performance; understanding their added value to philanthropy and giving; and identifying areas of strategic investment in the future.

8.2.5 Build inclusive multi-stakeholder partnerships that enable a systemic approach to solve existing issues.

8.3 Community level (for local and regional philanthropy, including local associations)

8.3.1 Strengthen fundraising capacity of PSOs so they can offer relevant technical support to reinforce local NGOs and CSOs and build community autonomy.

8.3.2 Encourage and accompany community philanthropy mechanisms – local funds, community foundations, women's funds, indigenous funds, giving circles, etc – to tap into local and diaspora resources.

8.3.3 Support platforms and organisations that help to bring resources to communities and/or local NGOs, such as online giving platforms.

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WINGS is a global network of philanthropy development and support organisations committed to ensuring philanthropy reaches its fullest potential as a catalyst for social progress. Our growing community of thought leaders and changemakers includes more than 200 member organisations across 58 countries.



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